



Panoramic Software, Inc.

VetProWeb – Veteran Case Management System : User Training Guide for New User Interface

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VetProWeb User Training

VetProWeb – Typical VSR Work Flow

The typical work flow for the case where a veteran requires a new VA Form to be completed and filed with the VA will be similar to this:

1. **Reception:** The veteran is greeted and entered into the Reception Queue. If the veteran's record already exists in the database, the VSR helping the veteran is taken to that record. If the veteran is not already in the database, a new record is created during the Reception process.
 2. **Interview:** The veteran is helped by a Service Officer, who "selects" the veteran from the Reception Queue and is "taken" to the Veteran Demographic screen. If necessary, new demographic information is entered on the demographic page. Dependents (spouse and children) may be entered at this time.
 3. **VA Form:** The Service Officer assists the veteran while the primary VA Form is completed. The Form is selected from the VA Form/Claim Activity page. This will automatically create a Claim Activity record behind the scenes which will be linked to the saved VA Form.
 4. The VSR may visit (edit) the Claim Activity screen to select Claimant (dependent), set the Diary Date, enter College information, etc.
 5. Add attached documents (scans) to the Claim Activity. In most cases the primary VA Form will include supporting Forms that will be filled in at the same time. In some cases the VSR may select and fill in additional forms. These forms may be printed, scanned and attached to the Claim Activity also.
- ... And possibly at some later time:
6. Print a Diary (Tickler) Report that includes this Claim Activity.
 7. Visit the Claim Activity screen to View the associated VA Form.
 8. Open the veteran's record and enter a Case Note documenting new activity on the case.
 9. Edit the Claim Activity screen to update Claim status or enter Award information.

The remainder of this Training Guide will cover each element of the Work Flow listed above.

The Reception Queue

VetProWeb has been “upgraded” to provide San Bernardino with capabilities similar to those in VCMS. This section describes the new Reception Queue functionality:

View of the Queue

The user will be taken to the Reception Queue grid immediately after logging in. It looks like this:

Reception Queue

Date Filter
View

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<input type="checkbox"/>	<input type="checkbox"/>	Visitor Name	Veteran Name	Arrival Time	WaitTime	Reason	Time Seen	Seen By	Time Completed	<input type="checkbox"/>	Visit Status	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	mickey mouse	mouse, mickey	08:23 AM	2918	TEST					5 Waiting	
<input type="checkbox"/>	<input type="checkbox"/>	Mickey Mouse	Mouse, Mickey M	08:24 AM	2917	TEST	09:01 AM	Claudia Frye			3 Interviewing	
<input type="checkbox"/>	<input type="checkbox"/>	Mickey Mouse	Mouse, Mickey M	08:24 AM	2855	TEST	07:59 AM	Art Vonwaldburg	07:59 AM		0 Completed	
<input type="checkbox"/>	<input type="checkbox"/>	Mousehead	Mousehead, Mickey	19:27 PM	0		19:27 PM	Art Vonwaldburg	19:28 PM		0 Completed	

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The [View] will be for the office at which the logged in user normally works. The Reception Queue for other offices or all offices is also available. The default sort order is by the [Visit Status], organized so that the clients waiting for service are at the top of the list.

The Reception Queue grid will contain a record for each visitor entered during the current day. Previous days may be included by changing the [Date Filter] value above the grid.

Inserting a new Visitor Record into the Reception Queue:

To insert a new visitor the user clicks on the [Insert] button at the top right of the Reception Queue grid:

<div> <div>Filter Arrival Date Column</div> <div>Date Filter 05/20/2013</div> <div>View All</div> <div>Insert</div> </div>												
1 - 3 of 3 <div> First Page Previous Next Last Page </div>												
		Arrival Date	Visitor Name	Veteran Name	Arrival Time	Visit Status	WaitTime	Time Seen	Seen By	Time Completed	VSR	Rea
		05/23/2013	Joe Mouse	Mouse, Mickey M 0	10:25 AM	0 Completed	6	10:31 AM	#Art	10:34 AM	C7030	
		05/23/2013	Jimmy Cricket		17:08 PM	3 Interviewing	0	17:08 PM	#Art			Check

A new Visitor record will open:

Reception Queue

Insert Visit

Save
Save and Re-Insert

Visit

Visitor First Name
Last Name

Visitor Phone Number

Reason

Visitor Relationship
Veteran

Veteran

Claim Related
☒

Veteran SSN
Linked Veteran

Veteran First Name
Last Name

Visit Status

Caution
☐

Resolution

Seen By

Office

VSR Name

Arrival Date 05/23/2013

Arrival Time
Time Seen
Time Completed

Save
Save and Re-Insert

[Visitor Last Name] Validation:

The [Visitor Last Name] field label is red indicating that a visitor last name must be entered for the record to be saved. When the last name has been entered, the [Save] buttons will become active.

The [Visitor Relationship] is a drop-down:

The screenshot shows a web form titled "Visit". At the top are two buttons: "Save" and "Save and Re-Insert". Below the title bar, the form contains several fields:

- Visitor First Name:** Mickey
- Visitor Phone Number:** (415) 222-4433
- Reason:** check on claim stat (with a small green checkmark icon and the letters "ABC" above it)
- Visitor Relationship:** A dropdown menu is open, showing options: Veteran (highlighted in blue), Veteran Spouse, Widow, Dependent, Other, and Veteran (at the bottom).
- Claim Related:** A checkbox that is checked.
- Veteran SSN:** An empty text field.
- Veteran First Name:** An empty text field.

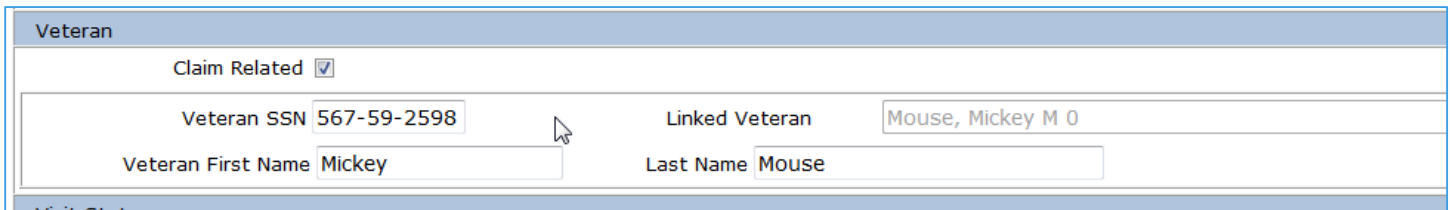
The value of [Claim Related] defaults to checked as shown. Veteran identification fields are shown.

The screenshot shows a web form titled "Veteran". It contains the following fields:

- Claim Related:** A checked checkbox.
- Veteran SSN:** An empty text field.
- Linked Veteran:** An empty text field.
- Veteran First Name:** An empty text field.
- Last Name:** An empty text field.

Linkage to a Record in the Veteran Table:

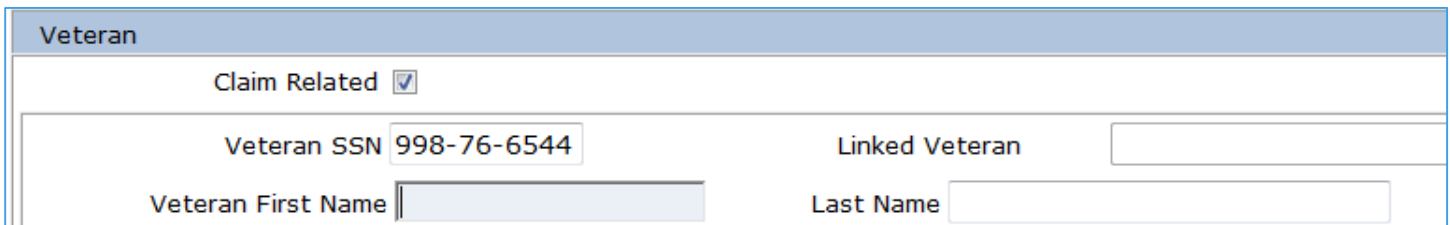
When [Veteran SSN] data is entered, the application determines if there is a match in the database. If there is a match, when the user tabs out of the SSN field, the Linked Veteran name is shown and the Veteran Name fields are filled in.



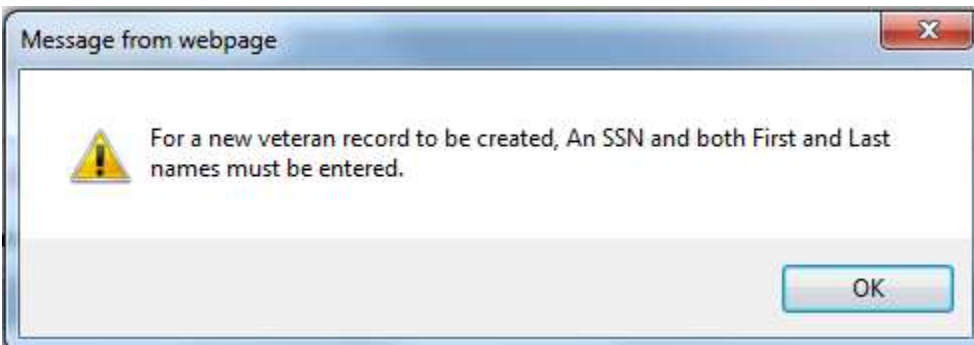
The screenshot shows a web form titled "Veteran". It contains a "Claim Related" checkbox which is checked. Below this are four input fields: "Veteran SSN" with the value "567-59-2598", "Linked Veteran" with the value "Mouse, Mickey M O", "Veteran First Name" with the value "Mickey", and "Last Name" with the value "Mouse". A mouse cursor is hovering over the "Veteran SSN" field.

The Veteran Name fields on the Visitor record are updated with the values of those in the veteran database table.

If there is not a match with the Veteran SSN in the database, no action is taken after leaving the [Veteran SSN] field, but the User is alerted that both first and last names for the veteran must be entered in addition to the SSN for a new veteran record to be created.



The screenshot shows the same "Veteran" form, but with different values. "Veteran SSN" is "998-76-6544", "Linked Veteran" is empty, "Veteran First Name" is empty, and "Last Name" is empty.



When there is no SSN match, the user may **cause** a new veteran record to be created by entering both veteran's First and Last names. Upon leaving the [Last Name] field, another attempt is made by the application. If there is no match to the Veteran SSN in the database **and** there has been data entered for **both** the first and last names, a new veteran record (folder) will be created. On return, the Linked Veteran field will be displayed to confirm there is a veteran folder.

If either the veteran is found or a new veteran record is created, the veteran SSN field is disabled from further editing.

Other Information Requested by the Visitor:

When the visit is "Claim Related" (the default) you will see the veteran information entry fields as described above:

Visit		
Visitor First Name	<input type="text"/>	Last Name <input type="text" value="mouse"/>
Visitor Phone Number	<input text"="" type="text" value=" (<input type="/>	
Reason	<input type="text" value="ABC"/>	
Visitor Relationship	<input type="text" value="Veteran"/>	
Veteran		
Claim Related	<input checked="" type="checkbox"/>	
Veteran SSN	<input type="text" value="123-12-3123"/>	Linked Veteran <input type="text" value="Mouse, Mickey"/>
Veteran First Name	<input type="text" value="Mickey"/>	Last Name <input type="text" value="Mouse"/>
Visit Status		
Caution	<input type="checkbox"/>	
Resolution	<input type="text" value="ABC"/>	
Office	<input type="text" value="San Bernardino"/>	
Seen By	<input type="text"/>	
VSR Name	<input type="text" value="Rachel Hay"/>	
Arrival Date	<input type="text" value="06/16/2013"/>	
Arrival Time	Time Seen	Time Completed
<input type="button" value="Save"/> <input type="button" value="Save and Re-Insert"/>		

However if you un-click the "Claim Related" checkbox, the veteran entry fields are hidden and a section many current VetProWeb users find useful is displayed:

Visit		
Visitor First Name	Jose	
Last Name	Jimenez	
Visitor Phone Number	(777) 777-7777	
Reason	<input checked="" type="checkbox"/> new claim	
Visitor Relationship	Veteran	
Veteran		
Claim Related	<input type="checkbox"/>	
Visit Status		
Cautious	<input type="checkbox"/>	
Resolution	<input checked="" type="checkbox"/>	
Seen By	<input type="text"/>	
Office	<input type="text"/>	
VSR Name	<input type="text"/>	
Arrival Date	05/23/2013	
Arrival Time	17:08 PM	Time Seen
		Time Completed
Information Requested by Visitor		
Comp/Pen Benefits: <input type="checkbox"/>	Widow Benefits: <input type="checkbox"/>	Education Benefits: <input type="checkbox"/>
Insurance Benefits: <input type="checkbox"/>	Housing Benefits: <input type="checkbox"/>	A and A Benefits: <input type="checkbox"/>
Appointment: <input type="checkbox"/>	Repeat Call: <input type="checkbox"/>	Status Request: <input type="checkbox"/>
Community Resource Referral: <input type="checkbox"/>	eVet Recs Referral: <input type="checkbox"/>	Referral to VA Clinic: <input type="checkbox"/>
Vet Connect: <input type="checkbox"/>	Employment Representative: <input type="checkbox"/>	Housing Representative: <input type="checkbox"/>
Medical Benefits: <input type="checkbox"/>	Claim Follow-up: <input type="checkbox"/>	Medi-Cal Referral: <input type="checkbox"/>
HCA Staff: <input type="checkbox"/>		
<input type="button" value="Save Changes"/>		

This section of check boxes can be used to track non-claim related services provided to the visitor.

Seen By:

On entry of a new Visitor record, the [Seen By] field is blank by default, but a VSR may be selected from a drop-down list.

Seen By

Office

VSR Name

Arrival Date

Arrival Time 1

ges

Copyr

Arrival Date:

And the arrival date may be edited if necessary.

Office

Seen By

VSR Name

Arrival Date

Arrival Time

Save and Re-In

Jun

2013

Su Mo Tu We Th Fr Sa

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30

Work Flow Using Buttons below the Reception Queue Grid

The buttons below the grid deliver the Reception Queue work flow functionality.

<input type="checkbox"/>		mouse	Mouse, Mickey	10:32 AM	16					5 Waiting
<input type="checkbox"/>		mouse	Mouse, Mickey	10:46 AM	2					5 Waiting
<input type="checkbox"/>		Mickey Mouse	Mouse, Mickey M	08:24 AM	2917	TEST	09:01 AM	Claudia Frye		3 Interviewing
<input type="checkbox"/>		Mickey Mouse	Mouse, Mickey M	08:24 AM	2855	TEST	07:59 AM	Art Vonwaldburg	07:59 AM	0 Completed
<input type="checkbox"/>		Mousehead	Mousehead, Mickey	19:27 PM	0		19:27 PM	Art Vonwaldburg	19:28 PM	0 Completed

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[Interview](#)
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If the visitor has come for a claim-related purpose, the row in the grid will show the name of the veteran in the database which has been linked to the visitor, as described above. The VSR will usually select the top green entry in the Reception Queue as that visitor has been waiting the longest.

Visit Log Report

The VSR may want to review the history of previous visits for the veteran. To do so, the Service Officer will click on the checkbox at the left side of the row in the Reception Queue grid for the selected veteran. This will highlight the row – grey. Then click on the [Veteran Visit Log] button at the right end of the buttons below the grid.

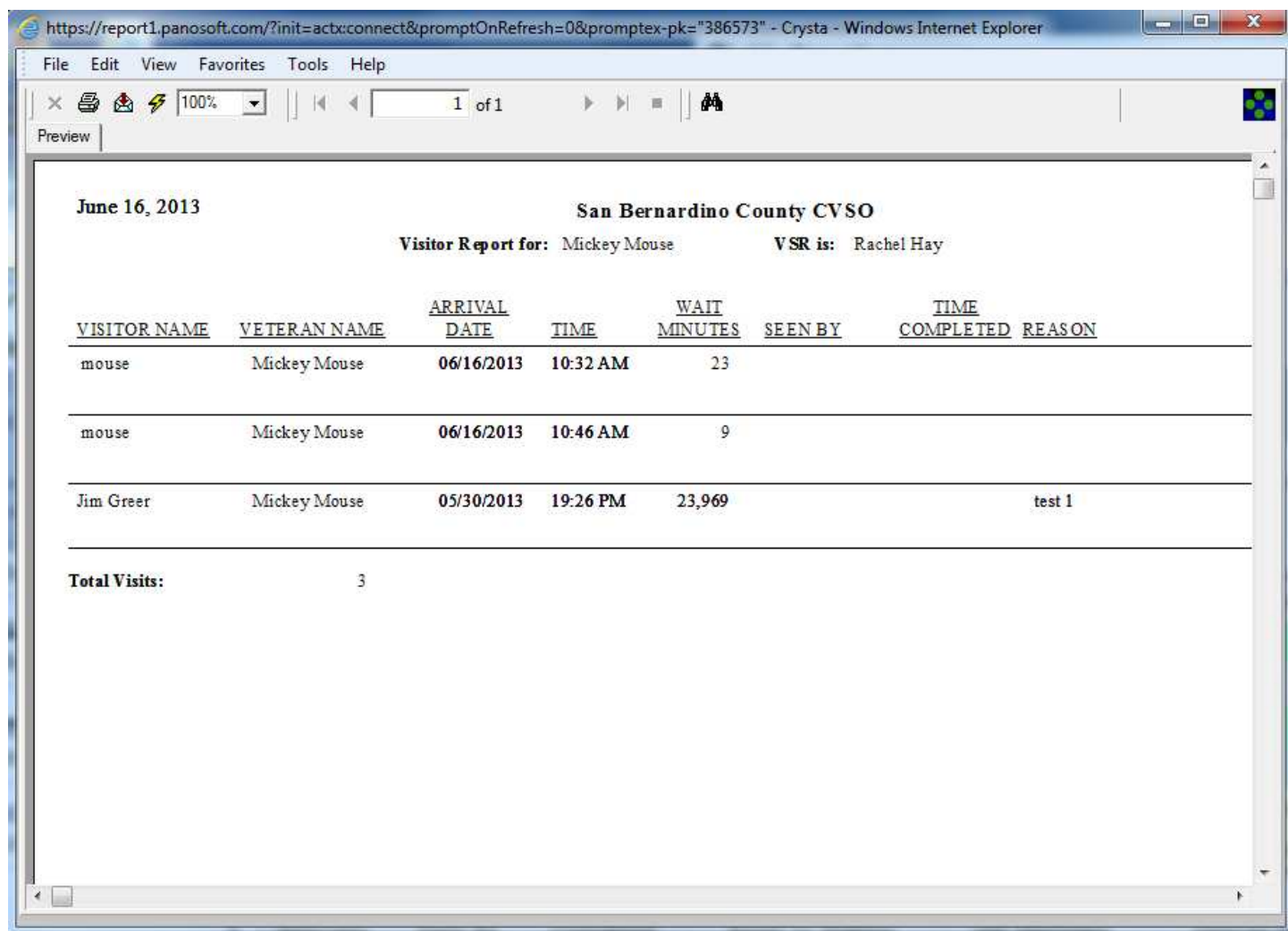
<input checked="" type="checkbox"/>		mouse	Mouse, Mickey	10:32 AM	16					5 Waiting
<input type="checkbox"/>		mouse	Mouse, Mickey	10:46 AM	2					5 Waiting
<input type="checkbox"/>		Mickey Mouse	Mouse, Mickey M	08:24 AM	2917	TEST	09:01 AM	Claudia Frye		3 Interviewing
<input type="checkbox"/>		Mickey Mouse	Mouse, Mickey M	08:24 AM	2855	TEST	07:59 AM	Art Vonwaldburg	07:59 AM	0 Completed
<input type="checkbox"/>		Mousehead	Mousehead, Mickey	19:27 PM	0		19:27 PM	Art Vonwaldburg	19:28 PM	0 Completed

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[Interview](#)
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[Veteran Visit Log](#)

A new window will open up with a report listing all visits by the veteran, most recent at the top:



The screenshot shows a web browser window with the address bar displaying a URL from panosoft.com. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The address bar shows a URL starting with https://report1.panosoft.com/. The browser window displays a report titled "San Bernardino County CVSO" for "Mickey Mouse". The report includes a table with columns for Visitor Name, Veteran Name, Arrival Date, Time, Wait Minutes, Seen By, Time Completed, and Reason. The table lists three visits, with the most recent at the top. The total number of visits is 3.

June 16, 2013		San Bernardino County CVSO					
Visitor Report for: Mickey Mouse		VSR is: Rachel Hay					
<u>VISITOR NAME</u>	<u>VETERAN NAME</u>	<u>ARRIVAL DATE</u>	<u>TIME</u>	<u>WAIT MINUTES</u>	<u>SEEN BY</u>	<u>TIME COMPLETED</u>	<u>REASON</u>
mouse	Mickey Mouse	06/16/2013	10:32 AM	23			
mouse	Mickey Mouse	06/16/2013	10:46 AM	9			
Jim Greer	Mickey Mouse	05/30/2013	19:26 PM	23,969			test 1
Total Visits:		3					

That report may be printed or saved as a PDF if desired. The report can be closed by closing the report window when done.

Interview:

To begin the interview with the claim-related visitor, the Service Officer will click on the checkbox at the left side of the row (highlighting the row -- grey) ... and then click on the [Interview] button:

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<input type="checkbox"/>	Visitor Name	Veteran Name	Arrival Time	WaitTime	Reason	Time Seen	Seen By	Time Completed	Visit Status
<input checked="" type="checkbox"/>	mouse	Mouse, Mickey	10:32 AM	29					5 Waiting
<input type="checkbox"/>	mouse	Mouse, Mickey	10:46 AM	15					5 Waiting
<input type="checkbox"/>	Mickey Mouse	Mouse, Mickey M	08:24 AM	2917	TEST	09:01 AM	Claudia Frye		3 Interviewing
<input type="checkbox"/>	Mickey Mouse	Mouse, Mickey M	08:24 AM	2855	TEST	07:59 AM	Art Vonwaldburg	07:59 AM	0 Completed
<input type="checkbox"/>	Mousehead	Mousehead, Mickey	19:27 PM	0		19:27 PM	Art Vonwaldburg	19:28 PM	0 Completed

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This will stamp the visitor record with the time seen, change the status to "Interviewing", identify the user as the VSR seeing the visitor and open the veteran's folder from which other related data may be entered and VA Forms completed.

Seen By:

If the visitor has not been linked to a veteran or there is no need to conduct an interview, the visitor row in the grid may be highlighted and the [Seen By] button below the grid clicked. That click will cause the [Seen By] field in the visitor record to be filled in with the name of the user who clicked the button.

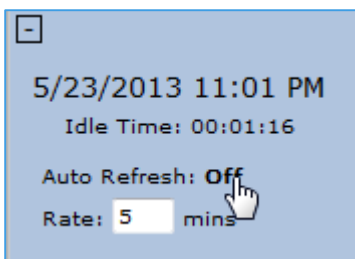
The [Time Seen] value will be time-stamped. If the user who has actually assisted the visitor was not the person who clicked the [Seen By] button, the person who clicked the button should open the visitor record and select the VSR who helped the visitor.

If the visitor has been helped and the visit is completed, the [Completed] button should be clicked to complete the record. The record may need to be opened to add a note about the resolution of the visit.

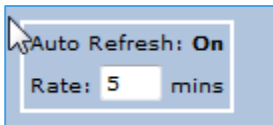
Monitoring Reception Status - Auto Refresh:

Users are able to monitor the current status of visitors in the Reception area while doing other work. The grid includes [Wait Time], which is automatically calculated as the number of minutes elapsed between the current time and the [Arrival Time]. A user may open the application to the Reception Queue grid and leave her screen on that View.

Browsers do not automatically refresh by themselves, however, so we have provided an "auto refresh" function - accessible in the top left corner of the screen:



To set her screen to automatically refresh every 5 minutes, the user will change the [Rate] number to "5" and click the [Off] field. The refresh status will change to "On" and a white border around the function will blink.



The screen (grid) will then refresh itself automatically every five minutes. However, be aware that any activity in the browser will turn auto-refresh Off so you may need to turn it back on after doing some other activity in that browser window.

Minutes Waited:

The number of minutes waited will increase while the visitor is waiting, but remain fixed after he is seen:

Completed:

When the visitor has been helped, either in an interview or otherwise and is done, a user may select the visitor record by clicking the checkbox at the left end of the row and click the [Completed] button. This click will time-stamp the [Time Completed] value in the visitor record.

Reset to Waiting:

Administrative users will see a [Reset to Waiting] button below the grid. [Reset] will completely reset the visitor record with respect to times as if it had just been entered, however visitor name, veteran linkage, notes and other data is preserved.

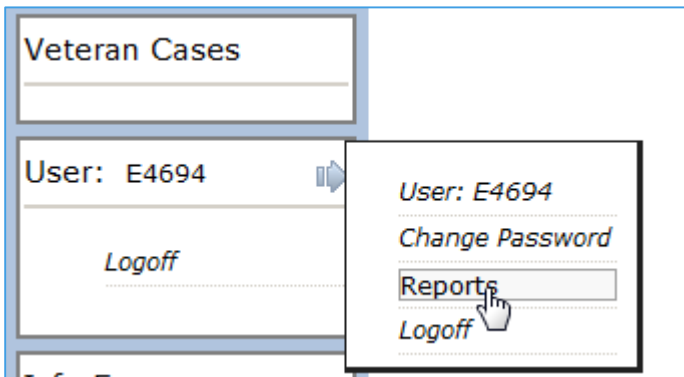
This button will be visible only to administrative (and above) users.

This completes the section on the Reception Queue.

VSR Diary Report

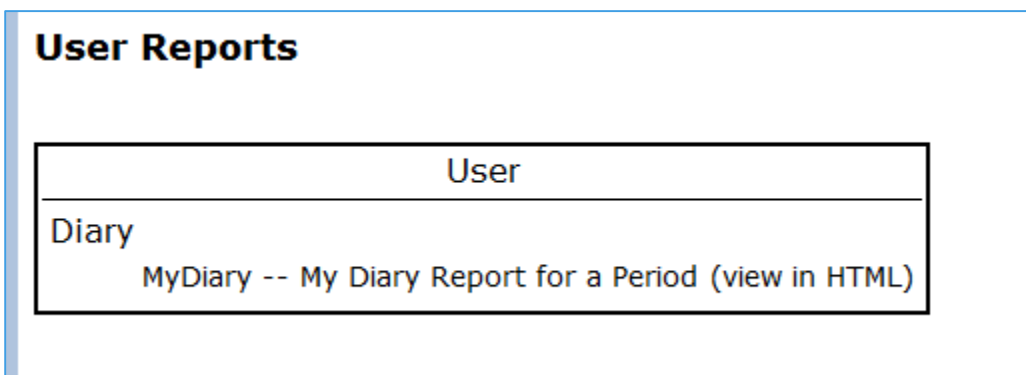
This section describes the Tickler or “Diary” report for a VSR.

To view your Diary Report, let your mouse hover over the [User: #####] menu on the left side of the screen:



... and select [Reports].

The User Reports page will be displayed.



Click on “MyDiary” to produce your caseload diary report.

You will be asked to enter a date range:

Please Provide Information - 1 of 2

You can provide a single value for this parameter.
Enter the value you want to include.

BegDate:
Enter Beginning Date of Diary Period
Please choose a date value (format: M/d/yyyy).

Value:
6/16/2013

June, 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

< Back

Today: 6/16/2013

And the report will be generated:

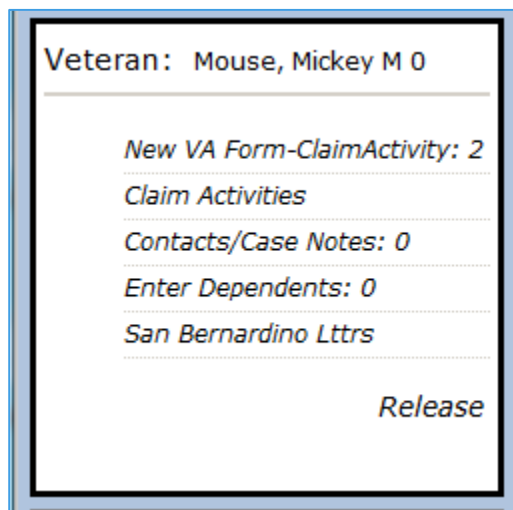
6/16/2013		San Bernardino County CVSO			Page 1
DiaryDate Report for Claudia Frye					
DiaryDates From: 1/1/2013 to: 6/16/2013					
VETERAN	VETSSNUM	CLAIM DATE	FORM		DIARY DATE
Harrison, Craig D	548-69-3986	06/13/2012	21-526	Vet App for Comp or Pension	06/13/2013
Whitney, Merle	506-12-1774	12/12/2012	21-8416	Rqst Info Med Lgl Expenses	06/12/2013
Whitney, Merle	506-12-1774	12/12/2012	21-4138	Statement in Support of Claim	06/12/2013
Oneal, Gary L	519-58-1757	09/12/2012	21-0781	Statement in Support of SC for PTSD	06/12/2013
Melillo, Dominic O	048-34-8981	06/12/2012	21-526b	21-526b Veteran's Supplemental Claim for Comp	06/12/2013
McClinton, Charles O	427-90-5764	12/12/2012	21-0847	Request For Substitution of Claimant Upon Death	06/12/2013
Casoli, John C	569-60-2259	06/12/2012	21-526b	21-526b Veteran's Supplemental Claim for Comp	06/12/2013
Alicante, William R	546-02-8886	12/12/2012	21-686C	Declare Marital Status - SC 30% or more	06/12/2013
Whitworth, Vance C Sr	377-12-0785	12/11/2012	20-5655	Financial Status Report	06/11/2013
Ware, Caroline A	561-75-8355	12/11/2012	21-4138	Statement in Support of Claim	06/11/2013
Schindler, Leroy	353-14-2760	12/11/2012	21-2680	App Aid & Attend / Housebound	06/11/2013
Schindler, Leroy	353-14-2760	12/11/2012	21-4138 LTC	Statement in Support of Claim - LTC - Supporting E	06/11/2013
Peruch, Joseph J	527-82-6078	12/11/2012	21-534	DIC for Spouse or Child	06/11/2013
Getz, William F	140-16-0865	12/11/2012	21-2680	App Aid & Attend / Housebound	06/11/2013
Getz, William F	140-16-0865	12/11/2012	21-4138 LTC	Statement in Support of Claim - LTC - Supporting E	06/11/2013
Gallegos, Frederick	557-68-3577	12/11/2012	21-4138	Statement in Support of Claim	06/11/2013
Dingfelder, William S Jr	184-14-7761	12/11/2012	21-2680	App Aid & Attend / Housebound	06/11/2013
Dingfelder, William S Jr	184-14-7761	12/11/2012	21-527	Inc/NetWrth and Emplmt Stmt	06/11/2013
Dingfelder, William S Jr	184-14-7761	12/11/2012	21-4138 LTC	Statement in Support of Claim - LTC - Supporting E	06/11/2013
Caronna, Sam E	573-40-1460	06/06/2012	21-526	Vet App for Comp or Pension	06/06/2013

Veteran View Elements

This section describes the application functions available when a veteran has been selected. Most users will spend a majority of their time in the “Veteran View” portion of the application. This is where essential veteran demographic information is entered. In addition: Case notes, or “Contacts” are entered here. Claim Activities are entered under the veteran view. Award information is entered here. Information on a veteran’s dependents is entered here. If a VA Form needs to be filled out, that will be done by selecting the proper form under the veteran view. If a transmittal or other form letter needs to be generated for the veteran, it will be done under the veteran view.

Veteran Navigation Element:

In most cases, a veteran is “selected” during the Reception Queue “flow”. Other times, you may go directly to the veteran grid and search for the veteran of interest. Once you have selected a Veteran, the Veteran information is stored in your **Session State** and the veteran sub-navigation menu elements are displayed:



The screenshot shows a navigation box for a veteran named "Mouse, Mickey M 0". The box contains several menu items, each with a count in parentheses: "New VA Form-ClaimActivity: 2", "Claim Activities", "Contacts/Case Notes: 0", "Enter Dependents: 0", "San Bernardino Lttrs", and "Release". The entire box is enclosed in a bold blue border.

Veteran: Mouse, Mickey M 0	
New VA Form-ClaimActivity:	2
Claim Activities	
Contacts/Case Notes:	0
Enter Dependents:	0
San Bernardino Lttrs	
Release	

The **bold outline** of the whole navigation box indicates that we are viewing the Veteran Page.

Veteran Sub-Navigation

There are 5 sub-menu items associated with each Veteran. Four of these menu items take you to grids of records related to the specific veteran: Claim Activity Grid, Contacts Grid, Dependent Grid and the “New VA Form-Claim Activity”. The “San Bernardino Lttrs” link gives you the ability to generate form letters in Microsoft Word™ containing data from the veteran’s record.

The Release menu item takes you back to the veteran grid.

The “New VA Form-Claim Activity” menu link is the primary place where a new claim activity is initiated, including creation of the VA Form linked to that claim activity. We will describe that in detail below, however first we look at the veteran “master” demographic page.

Veteran Page:

The Veteran screen contains demographic data on the veteran including, “Personal Information”, “Military Service” and “Other”.

Personal Information		Case ID: 1666167																																	
VA Claim No:	<input type="text"/>	SSN:	<input type="text" value="123-12-3123"/>																																
Last Name:	<input type="text" value="Mouse"/>	First Name:	<input type="text" value="Mickey"/>																																
Marital Status:	<input type="text"/>	Regional Office:	<input type="text" value="Select regionaloffice"/>																																
Address Line 1:	<input type="text"/>	Home Phone:	<input type="text"/>																																
Address Line 2:	<input type="text"/>	Work Phone:	<input type="text"/>																																
City:	<input type="text"/>	State:	<input type="text"/>																																
E-Mail:	<input type="text"/>	Cell Phone:	<input type="text"/>																																
<table border="1"> <thead> <tr> <th>Military Service</th> <th>Entry Date</th> <th>Released Date</th> <th>Serial #</th> <th>Branch</th> <th>Discharge</th> <th>Pay Grade</th> <th>Verified</th> </tr> </thead> <tbody> <tr> <td>1st:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>2nd:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>3rd:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>				Military Service	Entry Date	Released Date	Serial #	Branch	Discharge	Pay Grade	Verified	1st:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	2nd:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	3rd:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Military Service	Entry Date	Released Date	Serial #	Branch	Discharge	Pay Grade	Verified																												
1st:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>																												
2nd:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>																												
3rd:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>																												
Other																																			
Ethnicity:	<input type="text"/>	Education Level:	<input type="text"/>																																
Employment Status:	<input type="text"/>	Income Range:	<input type="text"/>																																
Power Attorney:	<input type="text"/>	Caution:	<input type="checkbox"/>																																
Notes:	<input type="text"/>																																		
Office:	<input type="text"/>	Entered On:	05/23/2013																																
Rep:	<input type="text"/>	Modified On:	05/23/2013																																
<div>Save Changes</div>																																			

The “Personal Information” section looks like this:

Personal Information		Case ID: 1666167	
VA Claim No:	<input type="text"/>	SSN:	<input type="text" value="123-12-3123"/>
		Sensitive:	<input type="text" value="v"/>
		Sex:	<input type="text" value="m"/>
Last Name:	<input type="text" value="Mouse"/>	First Name:	<input type="text" value="Mickey"/>
		Middle:	<input type="text"/>
		Suffix:	<input type="text"/>
Marital Status:	<input type="text" value=""/>	Regional Office:	<input type="text" value="Select regionaloffice"/>
Address Line 1:	<input type="text"/>	Home Phone:	<input type="text"/>
		SC %:	<input type="text" value=""/>
Address Line 2:	<input type="text"/>	Work Phone:	<input type="text"/>
		DOB:	<input type="text"/>
City:	<input type="text"/>	State:	<input type="text"/>
		Zipcode:	<input type="text"/>
E-Mail:	<input type="text"/>	DOD:	<input type="text"/>
		Cell Phone:	<input type="text"/>

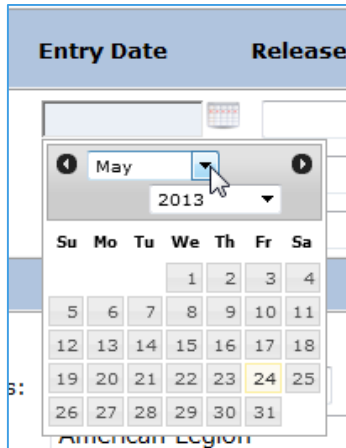
You may use the Tab key to move from field to field. Certain fields have drop-down lists of choices to select from. The choices can be easily “customized” so just let your “VetPro coordinators” know what might be needed and we will take care of it. Date fields have a “calendar-picker”. Social Security number and Phone number fields are self-formatting; you only need to enter the numbers, not the punctuation.

In VetPro, the [Sensitive] field means that the veteran’s case may only be seen by Administrator-level users. It will be blank by default, but an Administrator may set it to “Yes” or “No”. Once it has been set to “Yes”, the veteran’s record will only appear in a View called [SensitiveFiles], which is only available to Administrative users.

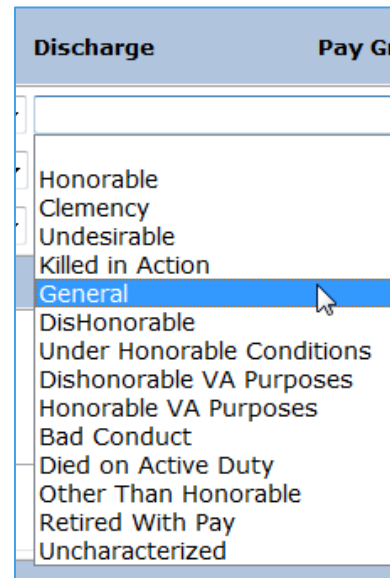
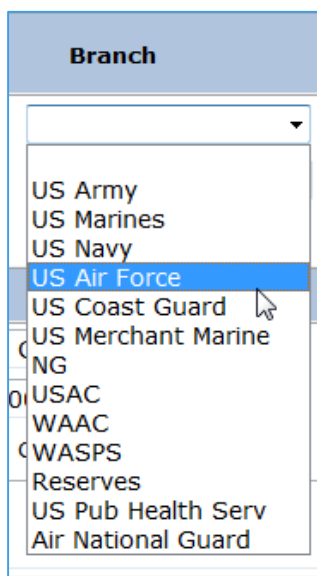
The Military Service section is shown below:

Military Service	Entry Date	Released Date	Serial #	Branch	Discharge	Pay Grade	Verified
1st:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
2nd:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
3rd:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

Entry Date and Release Date have calendar-pickers:



Branch has a drop-down selection, as does Discharge:



The Verified checkbox means that the information is backed up by the veteran's DD-214.

The “Other” section contains various information that is used on VA Forms so only needs to be entered once here:

Other			
Ethnicity:	<input type="text" value="Other"/>	Education Level	<input type="text" value="Did Not Complete H.S"/>
Employment Status:	<input type="text" value="Employed Full-Time"/>	Income Range	<input type="text" value="\$90,000 and above"/>
Power Attorney:	<input type="text" value="American Legion"/>	Caution:	<input type="checkbox"/>
		POW:	<input type="checkbox"/>
Notes:	<div><div>ABC</div><div></div></div>		

The standard drop-down values are shown below. Please let us know if your requirements are different:

Education Level	<input type="text" value="Did Not Complete H.S"/>
Income Rang	<input type="text" value="--Select--"/>
	<div><div>Did Not Complete H.S</div><div>GED</div><div>High-School Diploma</div><div>Some College</div><div>A.A/A.S</div><div>B.A/B.S</div><div>Masters</div><div>Doctorate</div></div>

Ethnicity:	Other
Employment Status:	--Select--
Power Attorney:	White
Notes:	African-American
	Hispanic
	Asian-American
	Pacific Islander
	Native-American
	Alaskan Native
Office:	Other

Power Attorney:	American Legion	Status:	NSC: Imp Pens
Notes:	American Legion	ney:	0%
	American Legion*		10%
	AMVETS		100%
	AMVETS*		20%
Office:	Army/Air Force Mutal Aid Assoc		30%
Rep:	Army/Navy Union, USA		40%
	Blinded Vet Assoc		50%
	Catholic War Vet of USA		60%
	CDVA		60IU
	CDVA*		70IU
	Disabled Amer Vet		80IU
	Disabled Amer Vet*		90IU
	Eastern Paralyzed Vet Assoc		90IU
	Fleet Reserve Assoc		A&A
	Gold Star Wives of Amer, Inc		IU
	Italian Amer War Vets of the US, Inc		N/R
	Jewish War Vets of the US		None
	Legion of Valor of the USA, Inc		Pend
	Marine Corps League		Yes
	Military Order of the Purple Hrt		Imp Pens

Income Range	\$90,000 and above
	\$0 - \$9,999
	\$10,000 - \$24,999
	\$25,000 - \$39,999
	\$40,000 - \$59,999
	\$60,000 - \$74,999
	\$75,000 - \$89,999
	\$90,000 and above

The POW checkbox allows you to track veterans who have been POWs:

POW: ☐

The Caution checkbox means that the veteran requires especially sensitive communications. When checked, the demographic screen will have a red border at the top to alert any VSR that may be helping this veteran:

View		Edit	
View Veteran			
<--Prev--		San Bernardino	--Next-->
Personal Information		Case ID: 1621273	
VA Claim No:	567592598	SSN:	567-59-2598
Sensitive:	Yes	Sex:	M
Last Name:	Mouse	First Name:	Mickey
Middle:	M	Suffix:	0

Caution: <input checked="" type="checkbox"/>
--

After editing the veteran demographic page, you must click the [Save Changes] button to save your data changes. The fields in the blue area are maintained automatically.

Office:	San Bernardino	Entered On:	03/06/2013	Entered By:	
Rep:	John Reynolds	Modified On:	05/24/2013	Modified By:	#Art
<input type="button" value="Save Changes"/>					

Inserting a New Veteran:

In some cases, you may need to enter a new veteran “manually”. To insert a new Veteran, you click the “Insert” button at the top of the Veteran Grid:

VetProWeb SBO

5/24/2013 9:34 AM
Idle Time: 00:00:05
Auto Refresh: Off
Rate: 5 mins

Dashboard
Reception Queue

Veteran Cases

Search Filter Lastname Column View San Bernardino Insert

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Lastname	SSN	File #	SC Rating	Vet Rep	Born	ID
Aadrado, George O	023-66-1556		None	B8641		1645502
Aarons, Charles S. O	266-62-0608	266620608	20	C1000	09/23/1942	1604015

The first step is to enter the new Veteran’s social security number. Each veteran is required to have a unique social security number in VetProWeb.

Veteran Cases

Insert Veteran

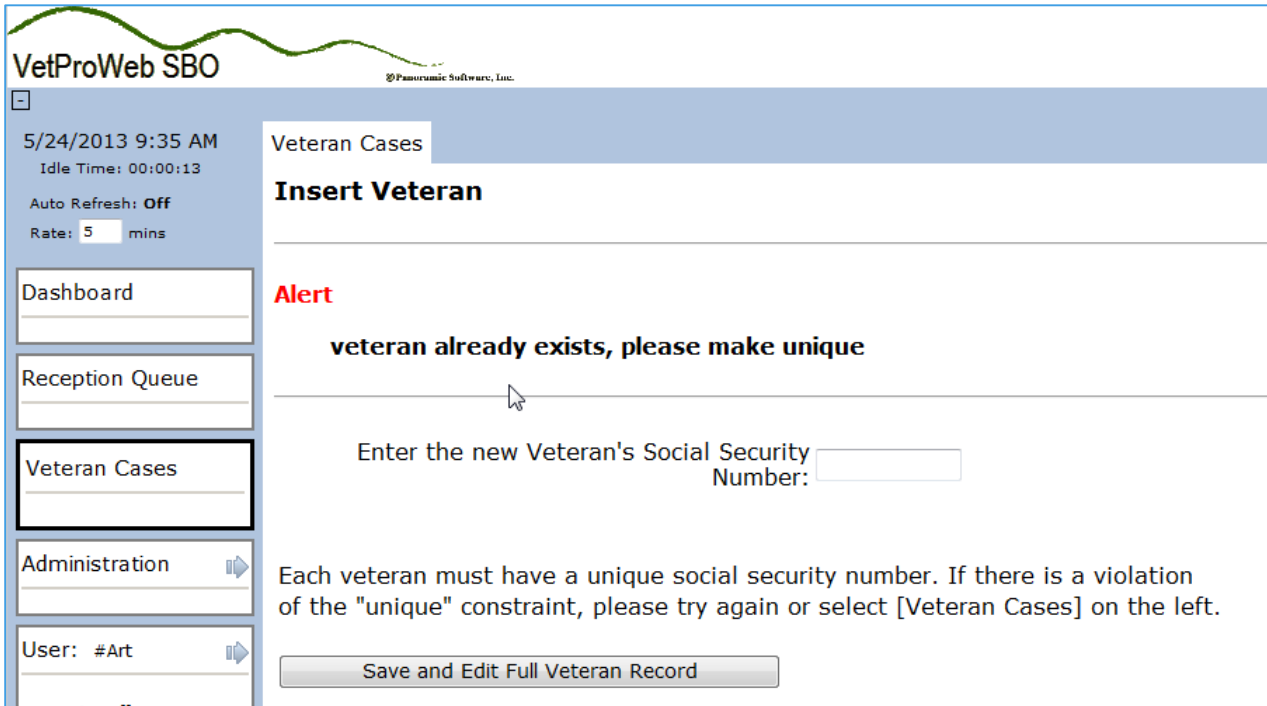
Enter the new Veteran's Social Security Number:

Each veteran must have a unique social security number. If there is a violation of the "unique" constraint, please try again or select [Veteran Cases] on the left.

Save and Edit Full Veteran Record

In this example an existing social security number has been entered.

Since the entered social security number is not unique, when the “Save and Edit Full Veteran Record” button is clicked, the save function will fail and an Alert will appear.



The screenshot displays the VetProWeb SBO interface. On the left is a navigation bar with a sidebar menu containing 'Dashboard', 'Reception Queue', 'Veteran Cases' (highlighted), 'Administration', and 'User: #Art'. The main content area is titled 'Veteran Cases' and 'Insert Veteran'. A red 'Alert' message states: 'veteran already exists, please make unique'. Below the alert is a text input field labeled 'Enter the new Veteran's Social Security Number:'. A message below the input field reads: 'Each veteran must have a unique social security number. If there is a violation of the "unique" constraint, please try again or select [Veteran Cases] on the left.' At the bottom of the main area is a button labeled 'Save and Edit Full Veteran Record'.

At this point you know the veteran already exists in the database and you can return to the Veteran Grid by selecting “Veteran Cases” in the Navigation Bar on the left. (Remember that a “sensitive” case may not be in your “View”. If you are entering a new Veteran and just made a typo, enter the correct social security number and click the “Save and Edit Full Veteran Record” button. If the save function is successful, you will be taken to the new Veteran record View Page. Click the Edit Tab to enter the remaining data.

Entering a New Claim Activity

When the veteran's demographic data has been entered, a new Claim Activity may be initiated by clicking the [New VA Form-ClaimActivity] link to the left of the demographic page:

VetProWeb SBO
5/24/2013 10:40 AM
Idle Time: 00:06:41
Auto Refresh: Off
Rate: 5 mins

Dashboard
Reception Queue
Veteran Cases

Veteran: Mouse, Mickey M 0

[New VA Form-ClaimActivity: 2](#)
[Claim Activities](#)
[Contacts/Case Notes: 0](#)
[Enter Dependents: 0](#)
[San Bernardino Lttrs](#)
[Release](#)

Edit Veteran [Save Changes] [- Save and Edit Prev] San Bernardino [Save and Edit Next->]

Personal Information Case ID: 1621273

VA Claim No: 567592598 SSN: 567-59-2598 Sensitive: Sex: Male
Last Name: Mouse First Name: Mickey Middle: M Suffix: 0
Marital Status: Married Regional Office: Select regionaloffice Los Angeles
Address Line 1: 1300 Harbor Blvd. Home Phone: 9092000507 SC %: 80
Address Line 2: Work Phone: DOB: 04/10/1932
City: Anaheim State: CA Zipcode: 92215 DOD:
E-Mail: Cell Phone:

Military Service	Entry Date	Released Date	Serial #	Branch	Discharge	Pay Grade	Verified
1st:							
2nd:							
3rd:							

Other

The Claim Activity “grid” page will be displayed:

VetProWeb SBO
6/16/2013 11:47 AM
Idle Time: 00:00:25
Auto Refresh: Off
Rate: 5 mins

Dashboard
Reception Queue
Veteran Cases

Veteran: Mouse, Mickey M

New VA Form-ClaimActivity 2
[Claim Activities](#)
[Contacts/Case Notes: 0](#)
[Enter Dependents: 2](#)
[San Bernardino Lttrs](#)
[Release](#)

New VA Form-ClaimActivity

Select A PDF Form - Claim Activity:
Associated Claim Activity:
Enter A Specific Description:
[Open New PDF Form]

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Creation	Form Name	Form Tag
05/28/2013	21-526EZ Form	HL/Tinn
05/28/2013	21-22 Appointment of Veterans Service Organization	POA DAV

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[Delete] [ChangeTag]

The first step is to click on the [Select a PDF Form – Claim Activity] drop-down. A list of possible claim activities is presented. This is a long list, listed alphabetically by form, so you can reach the form you are interested in by typing the initial part of the form name:

New VA Form-ClaimActivity

Select A PDF Form - Claim Activity:

Associated Claim Activity:

Enter A Specific Description:

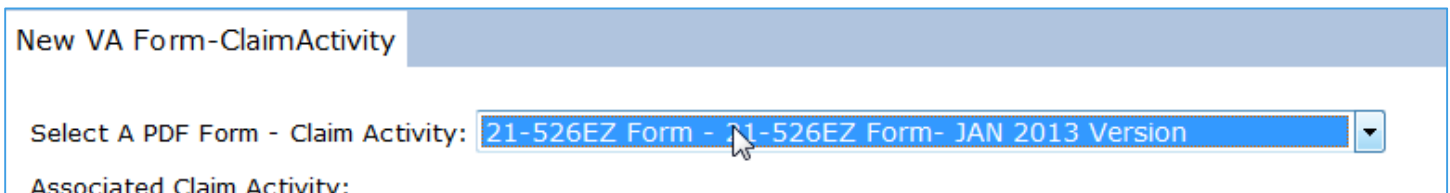
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	Form Name
<input type="checkbox"/>	21-0847 Substitution of Claimant - 21-0847 Request For Substitution of Claimant
<input type="checkbox"/>	21-0958 Notice of Disagreement - 21-0958 Notice of Disagreement
<input type="checkbox"/>	21-22 Appoint CDVA as POA - Appointment of Veterans Service Organization
<input type="checkbox"/>	21-22 Appointment of Veterans Service Organization - Appointment of Veterans Service Organization
<input type="checkbox"/>	21-2680 Exam for Hsebd Status or Need for A & A - Exam for Housebound Status or Need for A & A
<input type="checkbox"/>	21-4138 - Statement in Support of Claim - Statement in Support of Claim
<input type="checkbox"/>	21-4138 - Fiduciary - 21-4138 - Fiduciary
<input type="checkbox"/>	21-4138 - Incompetency Rating - Due Process Waiver for Incompetency Rating
<input type="checkbox"/>	21-4138 - Incompetency Rating - Due Process Waiver for Incompetency Rating
<input type="checkbox"/>	21-4138 -Statement to Secure Effective Date - FDC - Statement to Secure Effective Date
<input type="checkbox"/>	21-4138 - VA Benefit Letters - 21-4138 - VA Benefit Letters
<input type="checkbox"/>	21-4138 CF Statement in Support of Claim - Statement in Support of Claim
<input type="checkbox"/>	21-4140 Employment Questionnaire - Employment Questionnaire
<input type="checkbox"/>	21-4142 Form - Consent to Release Information
<input type="checkbox"/>	21-4142 Form With POA Address - 21-4142 with POA Address Dropdown
<input type="checkbox"/>	21-4170 Statement of a Marital Relationship - Statement of a Marital Relationship
<input type="checkbox"/>	21-4171 Supporting Statement Regarding Marriage - Supporting Statement Regarding Marriage
<input type="checkbox"/>	21-4185 Income from Property or Business - Income from Property or Business
<input type="checkbox"/>	21-4192 Reqst for EmployInfo in Connect w Claim - Request for Employ Info in Connection with Claim
<input type="checkbox"/>	21-4502 Automobile or Adaptive Equipment - Automobile or Adaptive Equipment
<input type="checkbox"/>	21-4706b Federal Fiduciary - Federal Fiduciary`s Account
<input type="checkbox"/>	21-509 Statement of Dependency of Parent(s) - Statement of Dependency of Parent(s)
<input type="checkbox"/>	21-526 Form - 21-526 Revised Form (\$0 auto fill)
<input type="checkbox"/>	21-526 Form - 21-526 Revised Form
<input type="checkbox"/>	21-526b Veteran`s Supplemental Claim - Veteran`s Supplemental Claim
<input type="checkbox"/>	21-526c Pre-Discharge Compensation Claim - Pre-Discharge Compensation Claim

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In this screen shot, we have typed “21-526 ...” Scrolling down from there takes us to the 21-526EZ.

Clicking on that form name will fill the “selection”.

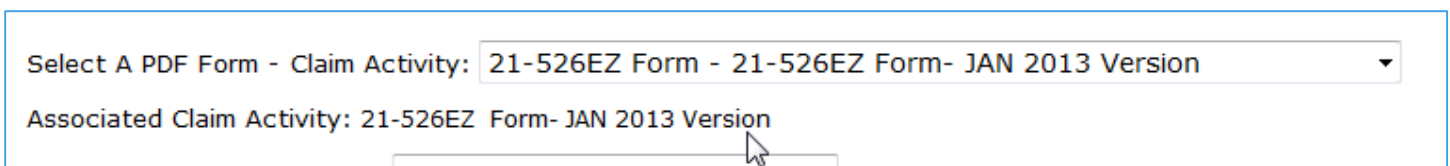


New VA Form-ClaimActivity

Select A PDF Form - Claim Activity: 21-526EZ Form - 21-526EZ Form- JAN 2013 Version

Associated Claim Activity:

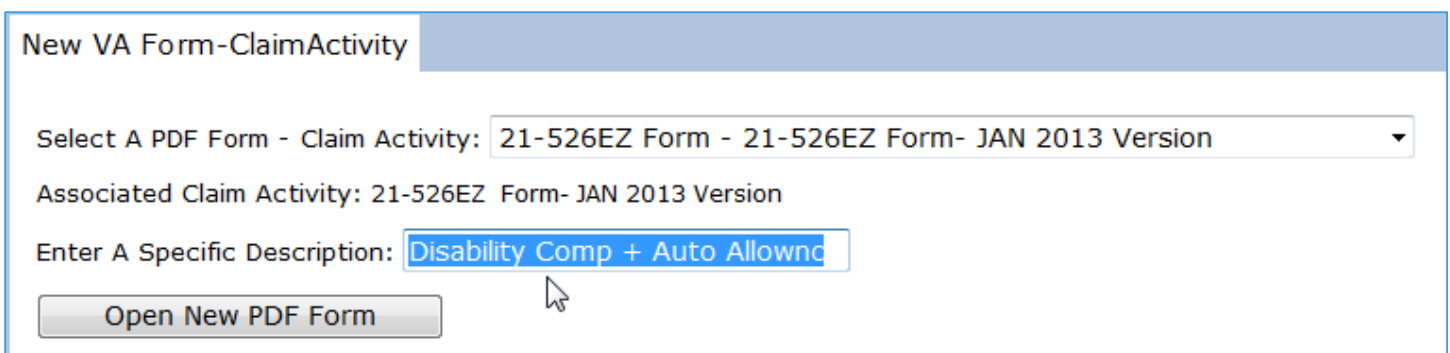
Clicking out of the selection, will display the associated Claim Activity linked to the selected form:



Select A PDF Form - Claim Activity: 21-526EZ Form - 21-526EZ Form- JAN 2013 Version

Associated Claim Activity: 21-526EZ Form- JAN 2013 Version

Next, add a short description of the reason the form is being filed:



New VA Form-ClaimActivity

Select A PDF Form - Claim Activity: 21-526EZ Form - 21-526EZ Form- JAN 2013 Version

Associated Claim Activity: 21-526EZ Form- JAN 2013 Version

Enter A Specific Description: Disability Comp + Auto Allowance

Open New PDF Form

Then click the [Open New PDF Form] button.

The VA Form will be opened and the veteran demographic data will be auto-filled:

Save Form

OMB Control No. 2900-0747
Respondent Burden: 25 minutes

Department of Veterans Affairs

APPLICATION FOR DISABILITY COMPENSATION AND RELATED COMPENSATION BENEFITS

IMPORTANT: Please read the Privacy Act and Respondent Burden on page 8 before completing the form.

SECTION I: IDENTIFICATION AND CLAIM INFORMATION

1. VETERAN/SERVICE MEMBER NAME (Last, first, middle) Mouse, Mickey M O		2. SOCIAL SECURITY NUMBER 567-59-2598	3. DATE OF BIRTH (MM,DD,YYYY) 04/10/1932
4. SEX <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE	5. HAVE YOU EVER FILED A CLAIM WITH VA? <input type="checkbox"/> YES <input type="checkbox"/> NO (If "Yes," provide your file number in Item 6)		6. VA FILE NUMBER 567592598
7A. CURRENT MAILING ADDRESS 1300 Harbor Blvd. Street address, rural route, or P.O. Box Apt. number Anaheim, CA 92215 USA City State ZIP Code Country		7B. FORWARDING ADDRESS Street address, rural route, or P.O. Box Apt. number USA City State ZIP Code Country	
7C. TELEPHONE NUMBERS (Include Area Code) DAYTIME 9092000507 EVENING CELL PHONE		8A. PREFERRED E-MAIL ADDRESS (If applicable)	
8B. ALTERNATE E-MAIL ADDRESS (If applicable)			

You may click into the fields on the form and fill them in. Use [Tab] or click to navigate through the fields.

When the form has been completed, click one of the [Save Form] buttons you will find at the top or bottom of a page:

Save Form

14A. WHAT IS THE NAME AND ADDRESS OF YOUR RESERVE/NATIONAL GUARD UNIT?	14B. WHAT IS THE TELEPHONE NUMBER OF YOUR CURRENT UNIT? (Include Area Code)
--	---

You will be returned the VA Form-Claim Activity grid and the new form will be at the top of the grid (the 21-526EZ is highlighted below):

New VA Form-ClaimActivity

Select A PDF Form - Claim Activity:

Associated Claim Activity:

Enter A Specific Description:

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Creation	Form Name	Form Tag
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05/28/2013	21-526EZ Form	Disability/Comp Auto Allowance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05/28/2013	21-22 Appointment of Veterans Service Organization	POA DAV

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For reference, this “location” is a place to see all of the VA Forms that have been filed for this veteran. Each VA Form is also associated with a Claim Activity.

The [Form Tag] is a short description of the reason the form was filed. It may be changed after the form has been saved by highlighting the row and clicking the [Change Tag] button.

panosoft.com needs some information

Script Prompt:

Enter New Tag

Enter the new text and click the [OK] button.

After filling in the VA Form, click on the [Claim Activities] menu link on the left to open the grid of all Claim Activities created for this veteran. The list of Claim Activities and the list of VA Forms are the same, but the Claim Activity grid below is focused on tracking everything about the claim itself.

VetProWeb SBO
 5/24/2013 10:53 AM
 Idle Time: 00:00:18
 Auto Refresh: **Off**
 Rate: 5 mins

Dashboard

Reception Queue

Veteran Cases

Veteran: Mouse, Mickey M O

New VA Form-ClaimActivity: 2
Claim Activities
 Contacts/Case Notes: 0
 Enter Dependents: 0
 San Bernardino Lttrs
 Release

Claim Activities

Search Filter Claim Date Column View All Insert

1 - 2 of 2 First Page Previous Next Last Page

	Claim Date	Claim Form	Auditable	Medi-Cal	Status	Activity Description	Post Date	Award Points	Lump Sum Amount	Monthly Amount	Prior Award Amount	Projected Award Amount	Retro Amount
<input type="checkbox"/>	05/24/2013	21-526EZ	Y		Pend	Disability Comp Auto Allownc		0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	05/21/2013	21-526b	Y		Pend	Test		0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

1 - 2 of 2 First Page Previous Next Last Page

Insert Delete

The most recent activity is at the top. Clicking on the 21-526EZ gives us the Claim Activity page. There are several parts to the screen, which is displayed on the next page:


View

Edit ClaimAward All

Veteran Information


Veteran Mouse, Mickey M 0 SSN 567-59-2598 File Number 567592598

Select an Appropriate Claim Activity Template

Claim Activity  21-526EZ - Fully Developed Claim (Compensation)


Auditable ☐ Y Benefit Type ☐ B Medi-Cal ☐ AidCode -- VA Form 21-526EZ Award Points 0 Award Type

Information About This Claim Activity

Activity Date 05/24/2013  Entry Location All Entered By #Art




Claimant/Dependent

Claim Note Disability Comp Auto Allownc

Claim Status Pend ☐ Suspense Date 05/24/2014  Deferred No

VA Form

Award Information

Post Date  Award Date  Letter/Decision Date 

SC Rating 80 Updated SC Rating ☐ Non-SC Rating Imp Pens Updated Non-SC Rating ☐

Retroactive Amount \$0.00 Monthly Amount \$0.00 Lump Sum Amount \$0.00 Prior Award Verified (Amount) \$0.00 Zero Percent Rating Awarded ☐

This is the place where nearly all information about the claim is tracked. Each section of the page is described below.

The top two sections are informational only:

Edit ClaimAward All

Veteran Information

Veteran Mouse, Mickey M 0 SSN 567-59-2598 File Number 567592598

Select an Appropriate Claim Activity Template

Claim Activity 21-526EZ - Fully Developed Claim (Compensation)

Auditable ☐ Y Benefit Type ☐ B Medi-Cal ☐ AidCode 00 VA Form 21-526EZ Award Points 2 Award Type

The veteran information is for reference. The Claim Activity is the one chosen when the VA Form was filled in. Information that is relevant to the DVS-19 “audit report” is displayed for reference below. Note that a “Medi-Cal” claim is only valid if the veteran has an auditable AidCode on record.

The next section has additional information about the Claim Activity:

Information About This Claim Activity

Activity Date 05/24/2013 Entry Location All Entered By #Art

Claimant/Dependent

Claim Note Fully Developed Claim (Compensation)

Claim Status Pend Suspense Date 05/24/2014 Deferred No

The Activity Date was set when the VA Form was created but this date can be changed. The Entry Location is the location the user was in when logged in to create the VA Form.

A Claimant/Dependent can be selected from a drop-down list of dependents entered for the veteran.

Claimant/Dependent

Claim Note

Mouse, Minnie - 567592599
Mouse, Mrs - 987654321

The Claim Note is a short description of the Claim Activity. The default value can be edited.

Claim Note Fully Developed Claim (Compensation) ... this can be edited

The Claim Status defaults to “Pend” ing but can be manually changed if appropriate:

Claim Status

Pend

Pend

Denied

Done

Rating Decision

View Attached PDF Form

If award information is entered (below) the status will be automatically changed to “Awarded”.

The Suspense (Diary) Date may be edited:

Suspense Date 05/24/2014

Defer

Jul

2014

Su Mo Tu We Th Fr Sa

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31

The next two sections give access to the VA Form that was created when the Claim Activity was created and allow you to enter award information:

VA Form	
View Attached PDF Form	
Award Information	
Post Date <input type="text"/>	Retroactive Amount <input type="text" value="\$0.00"/>
Award Date <input type="text"/>	Monthly Amount <input type="text" value="\$0.00"/>
Letter/Decision Date <input type="text"/>	Lump Sum Amount <input type="text" value="\$0.00"/>
SC Rating 80 Updated SC Rating <input type="text"/>	Prior Award Verified (Amount) <input type="text" value="\$0.00"/>
Non-SC Rating Imp Pens Updated Non-SC Rating <input type="text"/>	Zero Percent Rating Awarded <input type="checkbox"/>

Clicking on the [View Attached PDF Form] button opens the form:

Please fill out the following form. You cannot save data typed into this form.
Please print your completed form if you would like a copy for your records.
Highlight Existing Field

Save Form

OMB Control No. 2900-0747
Respondent Burden: 25 minutes

**VA DATE STAMP
(DO NOT WRITE IN THIS SPACE)**

Department of Veterans Affairs

**APPLICATION FOR DISABILITY COMPENSATION
AND RELATED COMPENSATION BENEFITS**

IMPORTANT: Please read the Privacy Act and Respondent Burden on page 8 before completing the form.

SECTION I: IDENTIFICATION AND CLAIM INFORMATION

1. VETERAN/SERVICE MEMBER NAME (Last, first, middle) Mouse, Mickey M O	2. SOCIAL SECURITY NUMBER 567-59-2598	3. DATE OF BIRTH (MM,DD,YYYY) 04/10/1932
4. SEX <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE	5. HAVE YOU EVER FILED A CLAIM WITH VA? <input type="checkbox"/> YES <input type="checkbox"/> NO (If "Yes," provide your file number in Item 6)	6. VA FILE NUMBER 567592598
7A. CURRENT MAILING ADDRESS 1300 Harbor Blvd.	7B. FORWARDING ADDRESS	7C. TELEPHONE NUMBERS (Include Area Code) DAYTIME 9092000507

Use your browser's back arrow to return to the Claim Activity record.

The Award information that is tracked consists of

VA Form	
View Attached PDF Form	
Award Information	
Post Date <input type="text"/>	Retroactive Amount <input type="text" value="\$0.00"/>
Award Date <input type="text"/>	Monthly Amount <input type="text" value="\$0.00"/>
Letter/Decision Date <input type="text"/>	Lump Sum Amount <input type="text" value="\$0.00"/>
SC Rating 80 Updated SC Rating <input type="text"/>	Prior Award Verified (Amount) <input type="text" value="\$0.00"/>
Non-SC Rating Imp Pens Updated Non-SC Rating <input type="text"/>	Zero Percent Rating Awarded <input type="checkbox"/>

The Post Date: The date the award information is posted in the database.

The Award Date: The Effective Date of the award.

The Letter/Decision Date: The date the VA generated the Award Letter.

If there is an updated disability rating, the new information can be entered here.

For each type of Claim Activity, only certain types of monetary awards are possible. In the case of the 21-526EZ both Retro and Monthly amounts may be awarded. The award amounts can be entered here. For other claims, only a Lump Sum award may be obtained. For a CW-5 only a Prior Award Verified may be entered. The award fields are editable or not based on the Claim Activity to protect against errors.

Attaching Documents to a Claim Activity

While we have the Claim Activity record open:

Edit ClaimAward [Save Changes](#) [<-Save and Edit Prev](#) [All](#) [Save and Edit Next->](#)

Veteran Information
 Veteran Mouse, Mickey M 0 SSN 567-59-2598 File Number 567592598

Select an Appropriate Claim Activity Template
 Claim Activity 21-526EZ - Fully Developed Claim (Compensation)

Auditable ☒ Y Benefit Type ☐ B Medi-Cal ☐ AidCode -- VA Form 21-526EZ Award Points 0 Award Type

Information About This Claim Activity
 Activity Date 05/24/2013 Entry Location All Entered By #Art
 Claimant/Dependent
 Claim Note Disability Comp Auto Allownc
 Claim Status Pend Suspense Date 05/24/2014 Deferred No

VA Form
[View Attached PDF Form](#)

We notice a sub-navigation link on the left side of the screen:

Claim Activity: 1629

[Attach Documents](#) [Release](#)

Claim Activity 21-526EZ

Auditable ☒ Y Benefit Type

Activity Date 05/24/2014

This is the link that allows us to attach all electronic files we may collect that are relevant to this claim.

Click on the [Attach Documents] link to open up the grid of attached documents:

VetProWeb SBO
5/24/2013 12:23 PM
Idle Time: 00:00:26
Auto Refresh: **Off**
Rate: 5 mins

Attach Documents

1 - 1 of 1 [First Page](#) | [Previous](#) | [Next](#) | [Last Page](#)

Category	Description	Name	File	Created By	Last Modifier	Transaction Date
	TEST	21-526b	VetProWeb/2013/05/21/1369160400051_526breynolds.pdf	jreynolds	jreynolds	05/21/2013

1 - 1 of 1 [First Page](#) | [Previous](#) | [Next](#) | [Last Page](#)

[Insert](#) [Delete](#)

Claim Activity: 1629

Attach Documents
[Release](#)

In this example there is already one document attached. Clicking on that row of the grid will open up the attached document so we can view it.

To attach a new document, click on the [Insert] button at the top right of the grid. That opens the attach documents dialogue:

Attach Documents

Insert File

[Save](#) [Save and Re-Insert](#)

Category:

Transaction Date:

Name:

Description:

File: [Browse...](#)

[Save](#) [Save and Re-Insert](#)

There are a large number of category choices:

Save Save and Re-Insert

Category: ▼

Transaction Date:

Name: Claim Forms (21-526, etc.)

Description: Current Medical Records

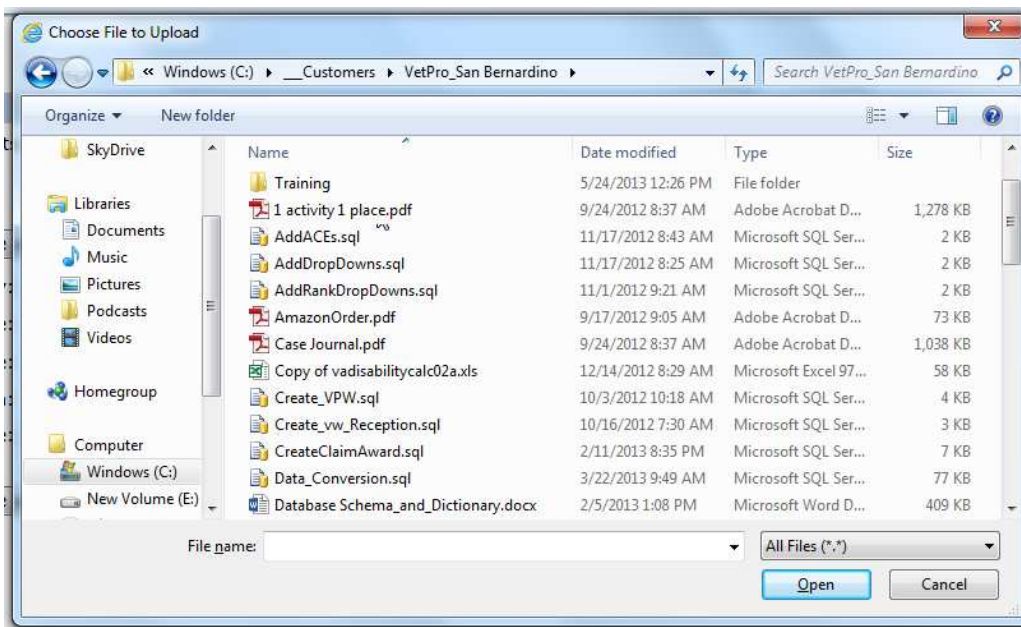
File: CW5

Save Save and Re-Insert

- Apportionment
- Awards, Postings
- Claim Forms (21-526, etc.)
- County Documents
- Current Medical Records
- CW5
- Death Certificate
- Education
- Enlistment Records
- Evidence
- Financial Information
- Marriage, Birth, Divorce Docs
- Medical Documents
- Military Documents
- Miscellaneous Documents
- Office Correspondence
- Personal Documents
- Referral
- Separation Docs (DD-214)
- Service Medical Records
- Service Records

Select a category, then enter a “transaction date” and a description of the document to be attached.

Then click on the [Browse] button to open the file dialogue:



Double-click on the file you want to attach and click [Save]. The file will be uploaded to VetPro and show up in the attached documents grid for this Claim Activity.

VetProWeb SBO
5/24/2013 2:43 PM
Idle Time: 00:00:04
Auto Refresh: **OFF**
Rate: 5 mins

Attach Documents

Search Filter Category Column View All Insert

1 - 2 of 2 First Page Previous Next Last Page

Category	Description	Name	File	Created By
Miscellaneous Documents	1 Activity 1 Place	test attachment	VetProWeb/2013/05/24/1369431768120_1activity1place.pdf	#Art
	TEST	21-526b	VetProWeb/2013/05/21/1369160400051_526breynolds.pdf	jreynolds

1 - 2 of 2 First Page Previous Next Last Page

Insert Delete

Attach Documents
Release

Clicking on the row in the grid will open the document for you to review, print or even save locally.

https://vetpro.panosoft.com/VetProWeb/viewfile.do?query=claimawarddoc&viewset=default&view=All& - Windows Internet Explorer

VetProWeb: Edit Veteran - Windows Internet Explorer provided by Human S...

Veteran: Reynolds, John C.

PAQS Records

Office Reports

Birth Date: 02/14/1975 Primary

Birth Place: San Bernardino, CA

Death Place:

Death Date:

Alert - Hostile: ☐ Host ☐ Inactive ☐ Medical ☐

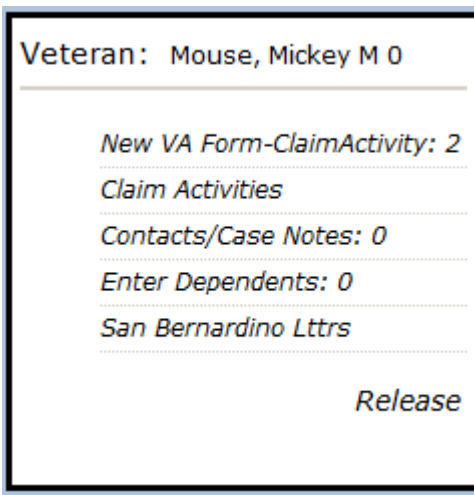
POA: CDVA

NSC Rating: SC Rating:

Release

Other Functions in the Veteran Context

We have covered the creation of a new Claim Activity and entry of the associated VA Form. We have discussed the Claim Activity screen for tracking all aspects of the Claim itself and the process for attaching electronic files to the Claim Activity record.



A screenshot of a software interface showing a menu for a veteran named Mickey M O. The menu is titled "Veteran: Mouse, Mickey M O" and contains several options: "New VA Form-ClaimActivity: 2", "Claim Activities", "Contacts/Case Notes: 0", "Enter Dependents: 0", "San Bernardino Lttrs", and "Release". Each option is preceded by a horizontal dotted line.

Veteran	Mouse, Mickey M O
New VA Form-ClaimActivity:	2
Claim Activities	
Contacts/Case Notes:	0
Enter Dependents:	0
San Bernardino Lttrs	
Release	

We will now discuss entering case notes, adding dependents and creating a transmittal letter for the claims package.

Contacts or Case Notes

The Contacts table contains a record, or case note, for each “contact” that was made with the veteran or on behalf of the veteran. Open the Contacts grid by clicking on the “Contacts/Case Notes” link on the left side of the screen:

Veteran: Mouse, Mickey M 0

New VA Form-ClaimActivity: 2

Claim Activities

Contacts/Case Notes: 0

Enter Dependents: 0

San Bernardino Lttrs

Release

The grid page will open:

VetProWeb SBO
©Panoramic Software, Inc.

5/24/2013 2:54 PM
Idle Time: 00:00:09
Auto Refresh: **Off**
Rate: 5 mins

Dashboard
Reception Queue
Veteran Cases
Veteran: Mouse, Mickey M 0
New VA Form-ClaimActivity: 2
Claim Activities
Contacts/Case Notes 0

Contacts/Case Notes

Search **Filter Contact Date Column** View **All** **Insert**

1 - 2 of 2 [First Page](#) | [Previous](#) | [Next](#) | [Last Page](#)

	Contact Date	Contact Type	Contact Code	Contact Note	Tick Dat
	09/19/2012	Case File Notes	NOTE	Veteran called with a complaint about a lack of contact from VA. I checked VPN	
	10/25/2007	Case File Notes	NOTE	LM for vet Re: claim.	

1 - 2 of 2 [First Page](#) | [Previous](#) | [Next](#) | [Last Page](#)
Insert **Delete** **SingleContact**

Click the [Insert] button to open a new case note:

Edit Contact **Save Changes** **<-Save and Edit Prev** **All** **Save and Edit**

Veteran Information

Veteran Mouse, Mickey M O SSN 567-59-2598 File Number 567592598

Contact Information

Type of Contact **OFFICE** Location **San Bernardino**

Contact Date 10/25/2007 Entered By

Tickler Date Alert ☐

Contact Notes

LM for vet Re: claim.

Save Changes

Select the appropriate Type of Contact and enter the Location if appropriate. Enter the Contact Date, which will default to “today”.

If you would like this note to appear in your Contact Tickler Report, enter a “due date” as the Tickler Date.

Enter as lengthy a Contact Memo as necessary to document your work. And, click [Save] to save the case note.

Dependents

The Dependents table contains a record for each spouse or child or otherwise dependent person of the veteran. The reason to enter the dependents (other than for reference) is to be able to have their information “auto-filled” on VA forms.

Open the Dependents grid by clicking on the “Enter Dependents” link on the left side of the screen:

Veteran: Mouse, Mickey M 0

New VA Form-ClaimActivity: 2

Claim Activities

Contacts/Case Notes: 0

Enter Dependents: 0

San Bernardino Lttrs

Release

The grid page will open:

VetProWeb SBO

5/25/2013 2:42 PM
Idle Time: 00:00:03

Auto Refresh: **Off**
Rate: 5 mins

Dashboard

Reception Queue

Veteran Cases

Veteran: Mouse, Mickey M 0

New VA Form-ClaimActivity: 2

Claim Activities

Contacts/Case Notes: 0

Enter Dependents 0

San Bernardino Lttrs

Release

Enter Dependents

Search Filter Name Column View All Insert

1 - 2 of 2 First Page Previous Next Last Page

	Name	Birthday	Relationship Type	Last4SSN	Vet Lastname	Date of Death
	Mouse, Minnie	06/25/1934	Other Relative	***-**-99	Mouse, Mickey M 0	
	Mouse, Mrs		Other Relative	***-**-21	Mouse, Mickey M 0	

1 - 2 of 2 First Page Previous Next Last Page

Insert Delete

Click the [Insert] button to open a new dependent record:

Veteran Cases

Insert Dependent

(Red indicates required field)

Save Save and Re-Insert

Veteran Information		
Veteran Mouse, Mickey M O	SSN 567-59-2598	File Number 567592598

Dependent Information		
First	Middle	Last
Relationship	Rep John Reynolds	POA
cc: College	Academic Yr:	
Address 1300 Harbor Blvd.		
:		
:	Anaheim	CA 92215
Phone	Email	
SSN	Unverified SSN <input type="checkbox"/>	Surv Spouse <input type="checkbox"/> NextOfKin <input type="checkbox"/>
Birth Date	Birth Certificate on File: <input type="checkbox"/>	
Birthplace	Death Date	
Marriage Date	Marriage Cert. on File: <input type="checkbox"/>	
Marriage Place		
Marriage Ended		

The first and last names, the relationship to the veteran and the dependent's SSN must be entered to save the record.

The Relationship field is a drop-down with a large number of selections. The POA field also has a large number of service organizations as selections. If the dependent is a college student, enter the college and the current academic year of enrollment.

The address will default to the veteran's address.

When the record is completed and saved, the dependent will be available as a selection for "Claimant" on a Claim Activity record.

Creating a Transmittal Letter



Form letters are available under the link called "San Bernardino Lttrs". When the link is clicked, the page of form letters will be displayed:

The screenshot displays the VetProWeb SBO interface. At the top left, the logo "VetProWeb SBO" is shown with a green wavy line above it. Below the logo, the text "Panoramic Software, Inc." is visible. The main interface is divided into several sections:

- Top Left:** A status bar showing the date and time "5/25/2013 3:20 PM", "Idle Time: 00:00:03", "Auto Refresh: Off", and "Rate: 5 mins".
- Left Sidebar:** A vertical menu with the following items: "Dashboard", "Reception Queue", "Veteran Cases", and "Veteran: Mouse, Mickey M 0".
- Main Content Area:** The title "San Bernardino Lttrs" is displayed at the top. Below it, the section "San Bernardino Form Letters" is shown. A table with the header "SBOLttrs" contains one row: "San Bernardino" and "CDVA Cover -- CDVA Cover".
- Bottom Section:** A detailed view of a letter for "Veteran: Mouse, Mickey M 0". It lists statistics: "New VA Form-ClaimActivity: 2", "Claim Activities", "Contacts/Case Notes: 0", and "Enter Dependents: 3". Below these, the text "San Bernardino Lttrs" is displayed, followed by a "Release" button.

Only one sample letter has been created at this time: A transmittal cover letter to the CDVA representative at the Los Angeles VA Regional Office.

Clicking on the link to the letter will cause Microsoft Word™ to be opened on your desktop and the form letter loaded with the current veteran's information inserted appropriately.

	<p>COUNTY OF LOS ANGELES DEPARTMENT OF MILITARY AND VETERANS AFFAIRS 2615 South Grand Avenue, Suite 100 Los Angeles, California 90007</p>	 United We Stand
<p>Ruth A Wong Director</p>		
<p>05/25/2013</p>		
<p>CA Department of Veterans Affairs PO Box 24010 11000 Wilshire Blvd Los Angeles, CA 90024</p>		
<p>RE: Mouse, Mickey M 0 SSN: 567-59-2598 C#: 567592598 ADDRESS: 1300 Harbor Blvd. Anaheim, CA 92215 PHONE: 9092000507</p>		
<p>To Whom It May Concern:</p>		
<p>Please find attached documents regarding claim for the veteran referenced above:</p>		
<p><input type="checkbox"/> 21-526 <input type="checkbox"/> 21-22 <input type="checkbox"/> Medical Evidence <input type="checkbox"/> DD-214 <input type="checkbox"/> 21-534 <input type="checkbox"/> VCAA Notice</p>	<p><input type="checkbox"/> 21-4138 <input type="checkbox"/> 21-686C <input type="checkbox"/> 28-1900 <input type="checkbox"/> 21-530 <input type="checkbox"/> 21-4142</p>	
<p>Thank you in advance for your assistance with this claim.</p>		
<p>Sincerely,</p> <p>Art Vonwaldburg (415)925-9935 Veterans Service Officer</p>		

This sample letter was a copy of a Los Angeles CVSO cover letter and is on their stationery.

This concludes the User Training Guide.